



Office of Space and Facilities Management  
OM, OD, NCI

*“Building a Foundation for Cancer Research”*

# Your Complete *Guide* to the *Renovation* and *Relocation* Process

## NCI Renovation Guidelines

The Office of Space and Facilities Management (OSFM) was established to assist the NCI with the acquisition, renovation and management of space. NCI has experienced significant growth in the past several years. Our growth is expected to continue in the upcoming years. In 2000, NCI established the following “Renovation Guidelines” to establish equity in the assignment of space, construction of space, acquisition of furniture and to reduce the NCI time, manpower and funding required to complete the renovation process.

New space is assigned to a program, only after a formal request to the OSFM has been made and the request has been reviewed. Subsequent to OSFM’s technical review, the request is forwarded to NCI senior management for approval. That process is described in detail in the NCI OSFM “Space Justification Document”, (SJD) which is available on the OSFM web page <http://osfp.nci.nih.gov/space/>

All NCI space is designed and constructed with specific program needs in mind. Open plan areas or “universal” office plans are used in lieu of the closed “suites” design to promote better communication and collaboration among program staff. Shared conference facilities are provided in order to maximize the use of limited space and to free assigned areas for program specific work. Standard office finishes as well as conference room finishes have been selected to establish a consistent NCI “Corporate” look. Standard furniture has also been selected to minimize the delivery schedule, reduce costs and afford a better chance of its reuse throughout NCI space without the complication of matching parts or matching colors. Currently, all costs associated with renovations of space are paid from central NCI funds so programs no longer need to use program operating funds. With prior special approval, program operating funds may be used for renovations and furniture.

# Seven Steps for a Successful Renovation and Relocation

## Step 1: Contacting the NCI Office of Space & Facilities Management for Assistance.

You may send your request for assistance to the Office of Space & Facilities Management via e-mail to the NCI Office of Space and Facilities Management mailbox located on the

NIH Global listing. Your e-mail should include the following information:

*Name of Division Point of Contact for the work*  
*Phone Number of Division Point of Contact*  
*Description of Work*

*Date you would like the work completed*  
*Name of your Administrative Officer*

Once the NCI Office of Space and Facilities Management (**OSFM**) receives your request, a Project Manager (**PM**) will be assigned to manage the project and act as your single point of contact for the entire project.

## Step 2: Defining the Project Scope of Work.

The **OSFM PM** will contact the Division Point of Contact (**POC**) and the Administrative Office (**AO**) within two weeks of receiving the request to schedule the first project meeting. The purpose of the meeting is to define the scope of work so that **OSFM** can develop a project budget and schedule. The **OSFM PM** will distribute and review with the **Division POC** and the **AO** the **OSFM** “Roles and Responsibilities Guidelines for the Renovation Process”. **OSFM** will submit the proposed scope, budget and schedule via e-mail to the **Division POC** and the **AO** for review and approval. The project schedule will be broken into design and construction phases if design is warranted. If the area to be renovated must be vacated for the renovation,

the **OSFM PM** will identify swing space and the date of temporary relocation. The schedule will also indicate key decision dates for the **Division POC**. These are dates within the schedule; the **POC** needs to make decisions in order to keep the project on schedule and within budget.

If the project is only minor work, sometimes referred to as Handyman work, the first meeting may be with the construction contractor and the **OSFM PM**. **OSFM** will send the estimated cost and scheduled construction date to the **Division POC** and the **AO** via e-mail for review and approval.

## Step 3: Scope, schedule and budget approval.

The **Division POC** and the **AO** should together review and approve the scope, schedule and budget via return e-mail. This review and approval constitutes their formal approval

and “sign off” on the scope, budget and schedule. Their approval should take no more than 3 days.

## Step 4: Design.

If the project warrants some type of design, an Architect and Engineering Firm (A/E), hired by **OSFM** will schedule the first design meeting with the **Division POC** and **OSFM PM**. The **OSFM PM** will manage the design and act as the single point of contact for the A/E Firm. If the project includes the relocation of existing furniture or purchase of new furniture, a furniture consultant (hired by **OSFM**) will also schedule a design meeting to begin the design for the reuse of existing furniture or for the purchase of new furniture.

The **OSFM PM** will issue a detailed design schedule outlining when the progress design plans and the furniture design will be submitted for the **Division POC**’s review and approval.

Once received, the **Division POC** must review and approve the space and furniture design and estimated construction cost before **OSFM** will proceed with construction. This review and approval constitutes their formal approval and “sign off” on the design. This review and approval should be completed in 1 week.

During the design phase, if the program area is required to move to swing space during the renovation, the **Division POC** will identify: *the names and phone numbers of each staff person moving; special equipment or computer requirements for the swing space; files to be relocated and other special needs of the program.*

# Seven Steps for a Successful Renovation and Relocation

## **Step 5: Relocation to swing space (if required)**

*See Step 7 below.*

## **Step 6: Construction.**

**OSFM** will manage the construction of the project and act as the single point of contact with the construction contractor. **OSFM PM** will schedule several “walk throughs” with the **Division POC** and **AO** while the renovation is in progress. The purpose of the “walk through” is to allow the **Division POC** to see the space in three dimensions and

to verify the design and construction meets the program needs. One final “walk through” will occur prior to the relocation of staff.

**Division POC** provides information required to order signage to **OSFM PM**.

## **Step 7: “The Move”.**

The **OSFM PM** will manage the relocation of program staff to swing space. The **OSFM PM** gathers all the information required for the telephone order and manages the completion of the installation of new phone and fax lines. The **OSFM ARC** will place the telephone order. **OSFM** will provide furniture, if the move is to temporary swing space; hire the movers and coordinate the relocation of computer equipment with NCI Net Center. The **OSFM PM** will distribute a move inventory sheet to each of the program staff (See attached sample - “Move Inventory Sheet”). Once the relocation is complete, the **Division POC** is responsible for collecting all the move inventory sheets and sending them to the **OSFM PM**. The **OSFM PM** will review the inventory sheets and reconcile any problems on behalf of the program. The **OSFM PM** will meet with the **Division POC** approximately **6 weeks** prior to the relocation of staff into the renovated area. This meeting explains the overall process and will identify what information **OSFM** needs from the program area for the move. The **Division POC** will need to provide: a single **POC** for the move; number of people moving; the name, phone number and new room location for each person moving; files, equipment and computers to be moved; and a determination of what furniture is to be surplus.

**Four weeks** prior to the move, the **OSFM PM** will issue a tentative move schedule identifying when the move

will commence, whether it is an evening or daytime move and when the move will be completed. Moves are scheduled during the evening or weekends to minimize any disruption. The normal “down time” associated with a move is 1/2 day prior to the move and 1/2 day after the move.

**Two weeks** prior to the move, the **OSFM PM** and Move Management Consultant will hold a “move class” to instruct the program staff on the proper procedures to label, pack boxes, how to complete the inventory sheet, to explain the move process to the entire program staff, and provide a detailed schedule when the movers will arrive and when the Net Center staff will arrive to shut down the computers.

**Three days** after the move, the **Division POC** or Move POC will return to the **OSFM PM** the move discrepancy forms, identifying what is missing, what is damaged, and any problems with phones, computers, furniture or the space itself.

The **OSFM PM** will develop one combined **OSFM** and Division final punch list for the space, review it with the **Division POC**, and track the punch list until all the work has been completed.

# Renovation and Relocation Checklist

	Responsibility	Status	
		Started	Completed
<b>Step 1:   Contacting NCI OSFM for Assistance</b>			
<ul style="list-style-type: none"><li>• Send e-mail to NCI, OSFM requesting renovation or relocation.</li></ul>	Division POC	<input type="checkbox"/>	<input type="checkbox"/>
<b>Step 2:   Defining the Project Scope of Work</b>			
<ul style="list-style-type: none"><li>• OSFM meets with Division POC within two weeks of receiving e-mail request (Step 1) to define project scope of work, schedule, and budget. Schedule includes key dates for Division approval.</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<b>Step 3:   Scope, Budget and Schedule Approval</b>			
<ul style="list-style-type: none"><li>• Division approves scope, budget and schedule.</li></ul>	Division POC	<input type="checkbox"/>	<input type="checkbox"/>
<b>Step 4:   Space and Furniture</b>			
<ul style="list-style-type: none"><li>• OSFM issues detailed space and furniture design schedule to Division POC.</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Division POC reviews and approves the space and furniture design and estimated construction cost</li></ul>	Division POC, & AO	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• If program is required to move to swing space, Division POC provides information required to OSFM</li></ul>	Division POC	<input type="checkbox"/>	<input type="checkbox"/>
<b>Step 6:   Construction</b>			
<ul style="list-style-type: none"><li>• OSFM conducts “walk throughs” with Division POC</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Program group approves constructed space during “walk through”</li></ul>	Division POC	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Division provides information required to order signage</li></ul>	Division POC	<input type="checkbox"/>	<input type="checkbox"/>
<b>Step 7:   Moving</b>			
<ul style="list-style-type: none"><li>• OSFM gathers information required for telephone orders and manages installation of new phone and fax lines</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• OSFM provides furniture if the move is to temporary space, hires movers, and coordinates relocation of computer equipment</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• OSFM distributes move inventory sheet to each of the program staff</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• OSFM reviews and reconciles inventory sheets</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• OSFM meets with Division POC six weeks prior to relocation to explain overall move process</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Division POC provides OSFM the single POC for move; number of people moving; name, phone number, and new room location for each person moving; files, equipment and computers to be moved; and what furniture is to be surplus.</li></ul>	Division POC	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• OSFM issues a tentative move schedule four weeks prior to move</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Move class is held two weeks prior to move</li></ul>	Move Manager	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• Division POC returns move discrepancy forms to OSFM three days after move</li></ul>	Division POC	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"><li>• OSFM develops one combined OSFM and Division punch list.</li></ul>	OSFM PM	<input type="checkbox"/>	<input type="checkbox"/>